Business Objects

Report Writing - CMS Net and CCS Claims

Introduction/Background

Business Objects is the software gateway for accessing data through a secured site on the Internet. The State Department of Health Care Services (DHCS) has developed two reporting systems that enable you to view **CMS Net Eligibility Reports** and **CCS Paid Claims** through Business Objects.

To use Business Objects you need, at a minimum, access to the Internet and Microsoft Internet Explorer Version 6.0.

- County users connect to the DHCS Extranet site https://portal.dhcs.ca.gov/businessobjects/enterprise115/InfoView/logon.aspx
- State users connect to the DHCS Intranet site http://dhssacbi02/businessobjects/enterprise115/InfoView/logon.aspx
- You will also need a Business Objects User ID and Password issued by the State. To obtain a password, please fill out DHCS 4074 on the CMS Net Website.

Please see the CMS Net and CCS Claims Corporate Reports Overview at http://www.dhcs.ca.gov/services/ccs/cmsnet/Documents/BOCMSGuide.pdf for more information on the existing corporate documents, password resets, and other basic issues.

Report Writing (Ad-Hoc)

There are only five report writers allowed per county. Report writers can create reports for themselves and other users in their county.

Requesting Report Writing Access

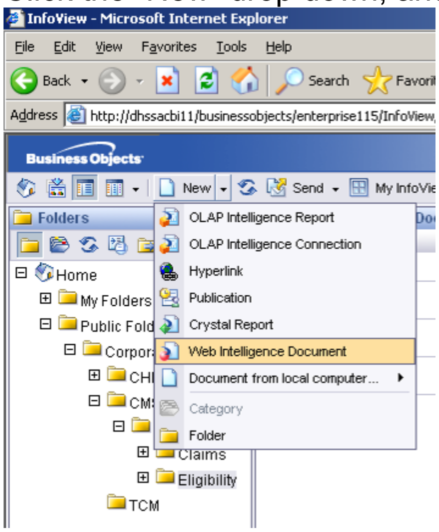
Your CCS Administrator is the only person who can request report writing access for your county. The CCS Administrator can use the DHCS 4074 form or email cmshelp@dhcs.ca.gov with the names of the users if they already have a Business Objects account. Please have your CCS Administrator specify the request is for report writing access.

Java Version

Business Objects requires Java to be installed on your computer. Use Java (JRE) Version 6, Update 18. Uninstall any newer Java versions you have on your computer. Please ask your local IT for installation assistance.

Create A New Report

Click the “New” drop down, and choose “Web Intelligence”



Choose the Universe you want to create your report in- CMS (CMS Net) or CCSCLM (CCS Claims)

New Web Intelligence Document

Universe	Owner	Folder
CCSCLM	DLeal	CMS/CMS-VCT
CHDP_P	DLeal	CHD/CHD-VCT
CMS	Administrator	CMS/CMS-VCT

Modify An Existing Report

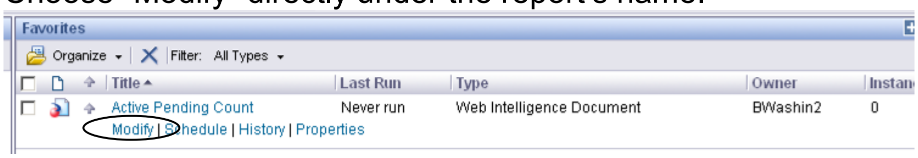
You can modify a report you created (My Folders > Favorites) or a report another user sent to your account (My Folders > Inbox).

Corporate documents (Public Folders > Corporate Documents) can also be modified, with the exception of the following (they are very complex and had to be created with special Business Objects software):

- CMS 07 – Healthy Families Caseload Count
- CMS 08 – Healthy Families Plan List per Client
- CMS 10 – MTU Client Count by ZIP Code
- CMS 11 – Cases Closed Due to Death of Client

You will not be able to save over the existing corporate document, but can save the corporate document to your favorites.

Choose “Modify” directly under the report’s name.

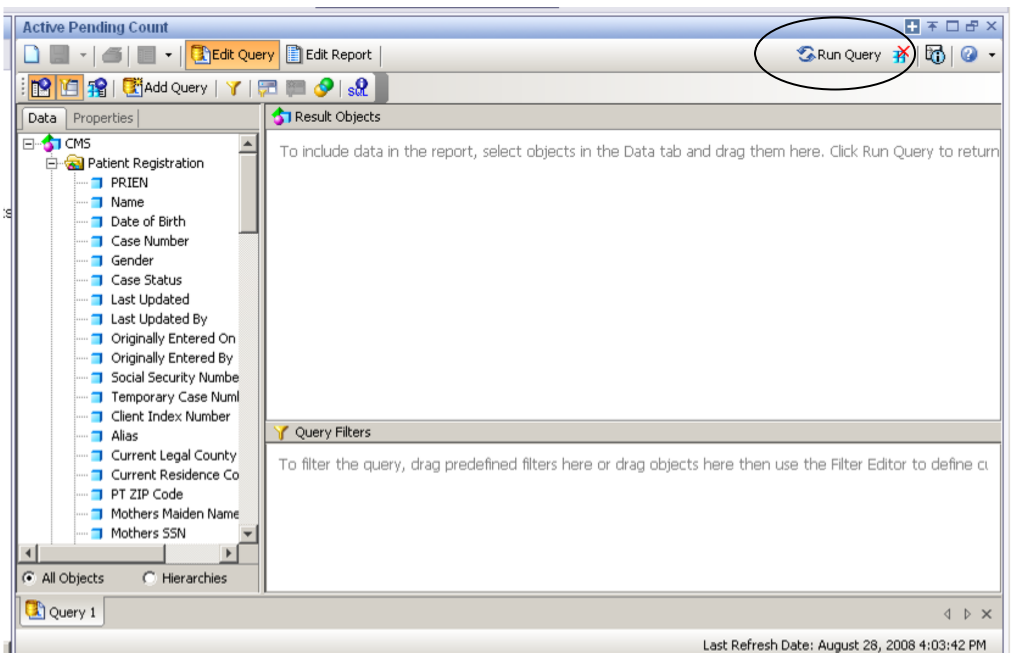


Edit Query View

This view allows you to choose what is displayed on your report. You can narrow down your search results in this view so only the data you are looking for will display on your report.

Edit Query has three main sections: Data (choose the objects (fields) your report will use), Result Objects (choose what objects you want to show on your report), and Query Filters (choose the objects you want to use to narrow down your report results).

After choosing the fields you want in your Result Objects and Query Filters, click the “Run Query” button to run the query you created.



Data Section

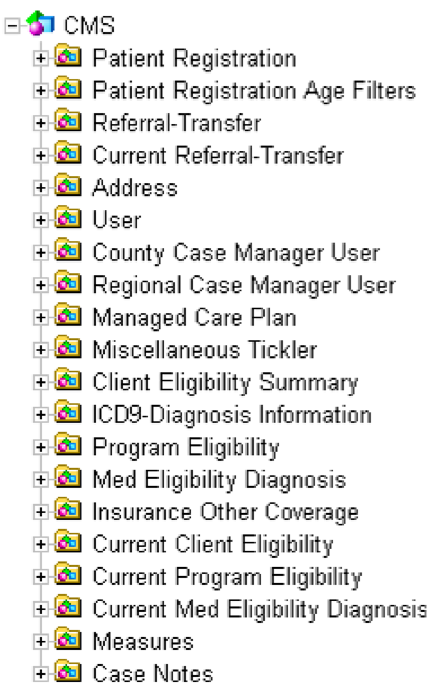
The data section contains several folders which represent different tables in Business Objects. The folders group together similar objects you can add to your report.

Take care in deciding which folder to pull your data from. Some folders will pull all information on a client, while others will only pull the latest data for a client. For instance, “Client Eligibility” in CMS Net will pull every client eligibility period the client has ever had, whereas “Current Client Eligibility” will pull only the last client eligibility period.

Other folders need an object in the query filters to narrow down results. For instance, the “Address” folder has many addresses for a client and you would not want them all to appear on your report. Using the “Address Type” object in the query filters would enable you to narrow down your results to display only one type of address.

The folders for CMS (CMS Net) and CCSCLM (CCS Claims) are shown below.

CMS Net Folders

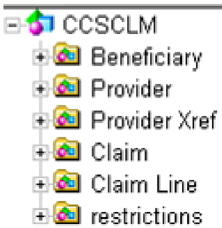


Patient Registration – Information as entered on the Patient Registration screen
Patient Registration Age Filters – Filters that narrow down your report to specific age ranges
Referral-Transfer – All referrals and transfers
Current Referral-Transfer – The last referral or transfer
Address – Addresses related to the case
User – Users with CMS Net ID and info on their Security level
County Case Manager User – Users assigned as the client’s county case manager

Regional Case Manager User – Users assigned as the client's regional case manager
Managed Care Plan – Managed care plan on the Insurance Coverage screen
Miscellaneous Tickler – System and user created ticklers from CMS Net
Client Eligibility Summary – All client eligibility periods
ICD9-Diagnosis Information – Client's diagnosis from Patient Registration
Program Eligibility – All program eligibility periods
Med Eligibility Diagnosis – All medical eligibilities from Client Eligibility
Insurance Other Coverage – Insurance Other Coverage screen data
Current Client Eligibility – The last client eligibility period
Current Program Eligibility – The last program eligibility period
Current Med Eligibility Diagnosis – The last medical eligibility from Client Eligiblity
Measures – System generated summary total of an object
Case Notes – Case notes data

Please refer to the CMS Net Data Dictionary for more detail on the objects in each of these folders.

CCS Claims Folders

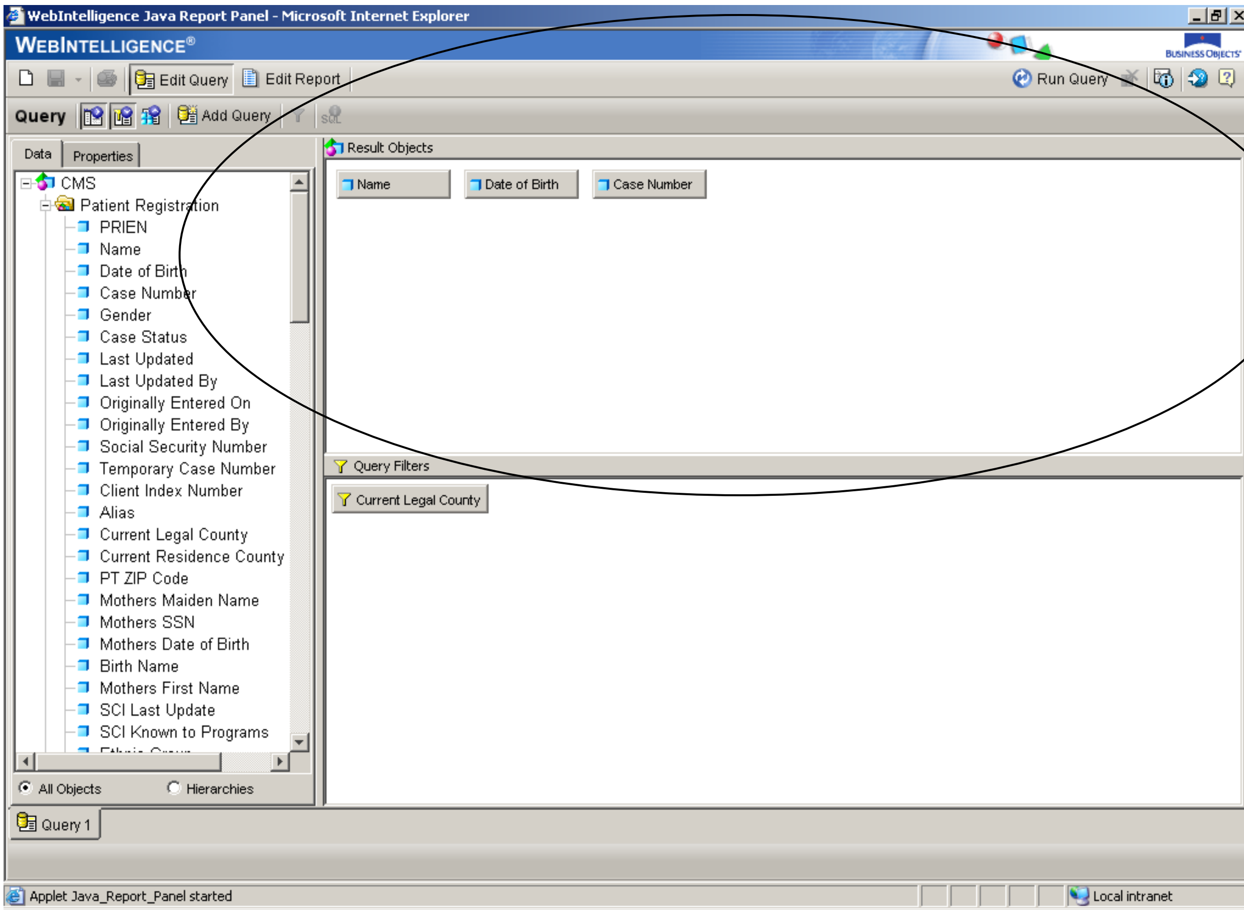


Beneficiary – Information about the beneficiary
Provider – Information about the provider
Provider Xref – Cross reference of the Provider Number. This will list the provider's NPI or Medi-Cal Number (whatever number is not on the claim)
Claim – Claim summary information
Claim Line – Claim detail information
Restrictions – Internal table, do not use

Please refer to the CCS Claims Data Dictionary for more detail on the objects in each of these folders.

Result Objects Section

The Result Objects section is the area where you place the objects you want to display in your report results. For example, the screenshot below will generate a report where the client's name, date of birth, and case number are the fields on the final report.



Moving Objects To and From the Result Objects Section

There are three ways of moving objects to the result objects section:

- Clicking your mouse on the object and hitting the enter key
- Double clicking your mouse on the object
- Clicking your mouse on the object, holding your left mouse button, and dragging the object to the result objects section

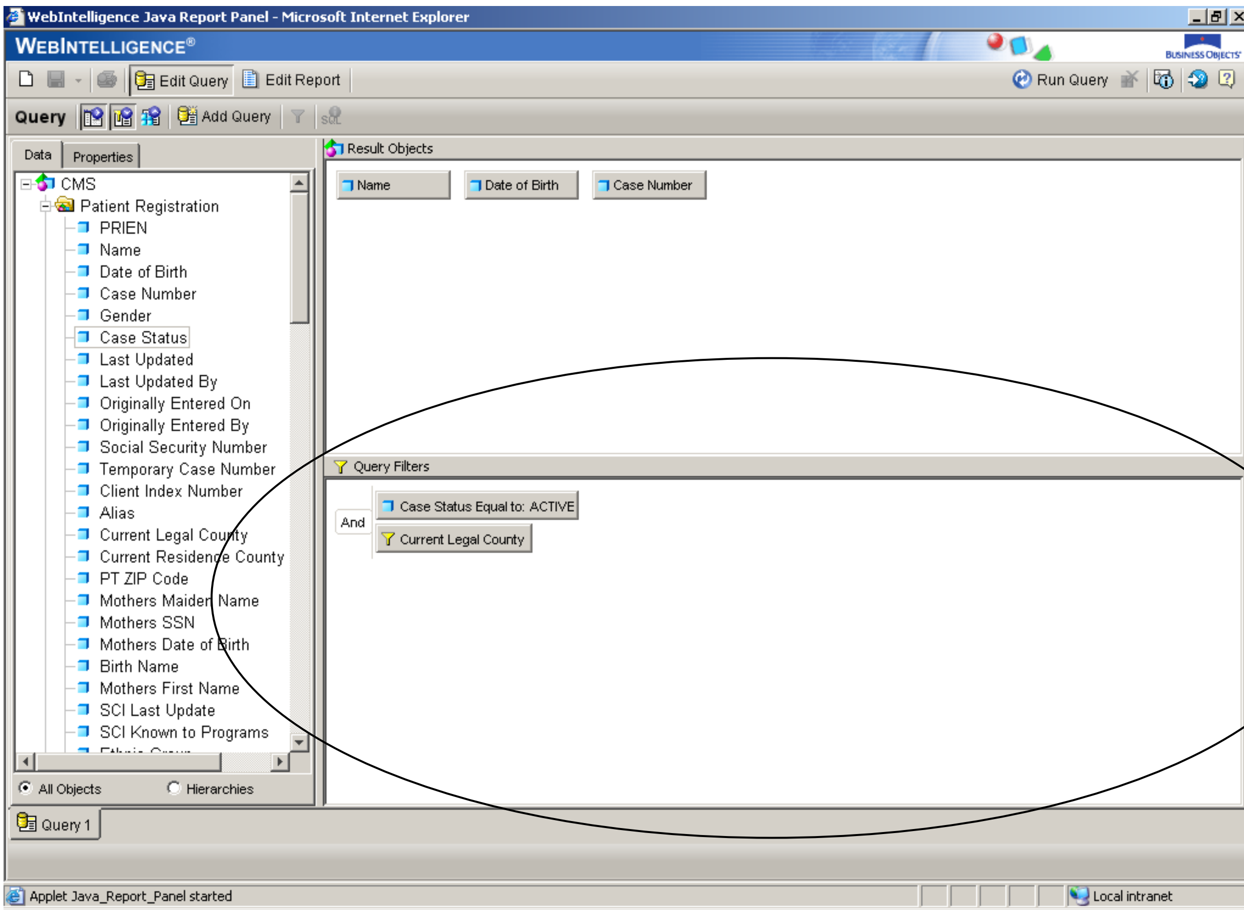
There are two ways of taking objects off the result objects section:

- Clicking your mouse on the object and hitting the delete key
- Clicking your mouse on the object, holding your left mouse button, and dragging the object to the data section

Query Filters Section

The Query Filters section is the area where you narrow down your results. Report writers don't want the report to list every possible result, but only those results that are relevant to the question the report writer is using the query to answer.

For example, the screenshot below limits the results to only active users who are currently assigned to my county.



If the report wasn't limited in this way, the results would show all active, pending, reopen pending, transfer active, denied, not open, and closed cases for all clients who were ever assigned to my county.

<u>The query filters section is the area you want to check first when reports are not running correctly.</u>

Moving Objects To and From the Query Filters Section

There is one way to move objects to the query filters section:

- Clicking your mouse on the object and dragging the object to the query filters section

There are two ways of taking objects off the query filters section:

- Clicking your mouse on the object and hitting the delete key
- You can also click your mouse on the object and drag the object to the data section

Current Legal County Filter

Make sure to always use the Current Legal County filter if you are a county user. This will ensure that your results are for clients who are currently assigned to your county. Excluding this filter will also give you results for all clients who were ever assigned your county in CMS Net.

The filter is located at the very bottom of the Patient Registration folder.

Query Filter Editor

The query filter editor is the tool where you create a filter for your report.

Operators – Quick Reference

The following table will help you select the operator you need to define a query filter:

To retrieve values...	for example...	select...	to create this filter...
equal to a value you specify,	retrieve data for the US only,	Equal to	<Country> Equal to US
different from a value you specify,	retrieve data for all quarters except Q4,	Different from	<Quarter> Different from Q4
greater than a value you specify,	retrieve data for customers aged over 60,	Greater than	<Customer Age> Greater than 60
greater than or equal to a value you specify,	retrieve data for revenue starting from $1.5M upward,	Greater than or equal to	<Revenue> Greater than or equal to 1000500
lower than a value you specify,	retrieve data for exam grades below 40,	Less than	<Exam Grade> Less than 40
lower than or equal to a value you specify,	customers whose age is 30 or less,	Less than or equal to	<Age> Less than or equal to 30
between two values you specify that includes those two values,	weeks starting at week 25 and finishing at 36 (including week 25 and week 36),	Between	<Weeks> Between 25 and 36
outside the range of two values you specify,	all the weeks of the year, except for weeks 25 through 36 (week 25 and week 36 are not included),	Not between	<Weeks> Not Between 25 and 36
the same as several values you specify,	you only want to retrieve data for the following countries: the US, Japan, and the UK,	In list	<Country> In list 'US; Japan; UK'
different from the multiple values you specify,	you don't want to retrieve data for the following countries: the US, Japan, and the UK,	Not in list	<Country> Not in list 'US; Japan; UK'
for which there is no value entered on the database,	customers without children (the children column on the database has no data entry),	Is null	<Children> Is null
for which a value was entered on the database,	customers with children (the children column on the database has a data entry),	Is not null	<Children> Is not Null
that includes a specific string,	customers whose date of birth is 1972,	Matches pattern	<DOB> Matches pattern, '72'
that doesn't include a specific string,	customers whose date of birth is not 1972,	Different from pattern	<DOB> Different from pattern, '72'
that corresponds to two values you specify,	telco customers who have both a fixed telephone and a mobile phone,	Both	<Account Type> Both "fixed" and "mobile"
that corresponds to a single value and does not correspond to another value you specify	telco customers who have a fixed telephone, but don't have a mobile phone,	Except	<Account Type> "fixed" Except "mobile"

Operand Types

The operand type is the type of input you want to use for your query filter. There are three different types:

- Constant: Type a value or values manually
- Value(s) from List: Choose a value or values from a list of possible choices. The list may take some time to generate (you might think Business Objects crashed, but it's just trying to create your list)
- Prompt: Make the person who runs the report choose what value or values they want to use for the report

Typing a Value – CAPS is the Rule

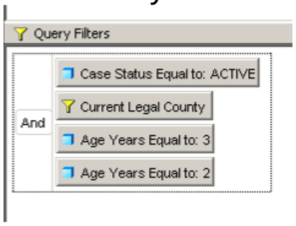
Almost all the values in Business Objects require you to use ALL CAPS when typing in a value in the query filter editor. Using anything other than CAPS will cause your report to return no results.

The one exception is the Subject Code field of the Case Notes table. This field has specialized capitalization. Type the subject code(s) you want exactly as shown on the Case Notes Subject Code and Descriptions list.

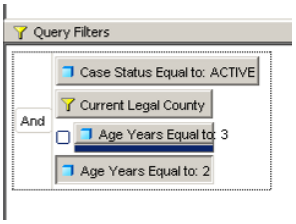
And Versus Or

The query filter section defaults to using "and" so your queries use all your query filters in the report. You can change the "and" to "or" so the query chooses one filter or another when pulling results.

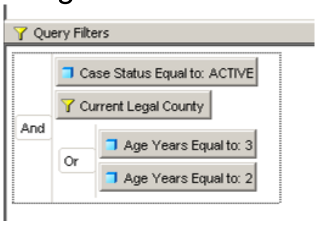
Create all your filters,



then click and drag one filter under another with your mouse until one looks like it becomes indented.



Let go of the mouse button, and an “or” will be created.



Now, instead of the report trying to find a client that is both 2 and 3 years old (which is impossible so no results would be displayed), The report will find clients who are either 2 or 3.

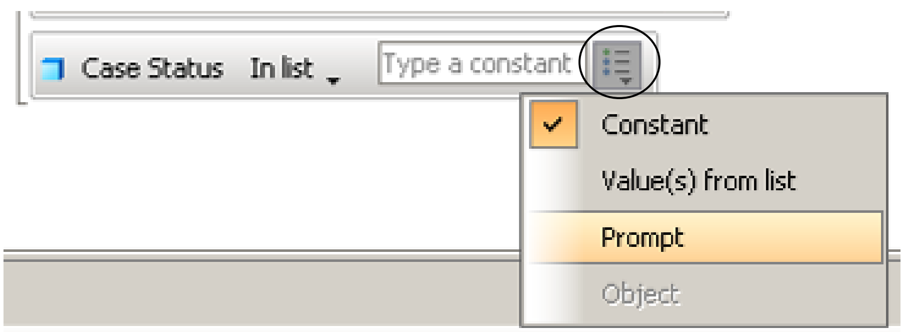
<u>The operand “in list” is easier to use than an “or” and can be used instead of “or” most of the time.</u>

You can double click the “and” and “or” to switch between “and” and “or.”

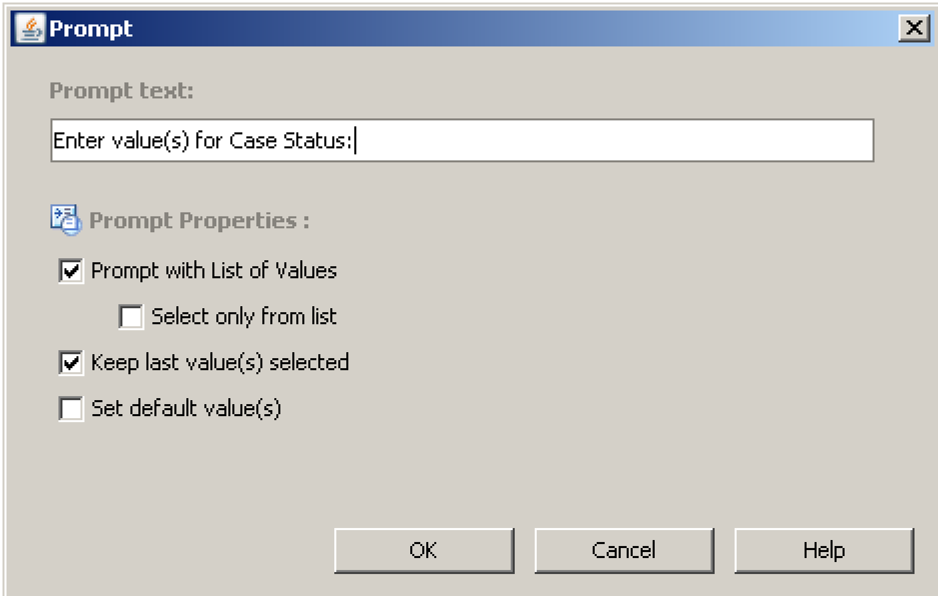
Prompts

Prompts are useful when you want to change your query conditions every time you run your report. For example, if you want to change your date range every time you run your report, prompts would be an easy way to accomplish this.

Add a query filter or use an existing query filter. Click on the box to the right of the filter and select “Prompt”.



You can modify how you want the prompt to be displayed.

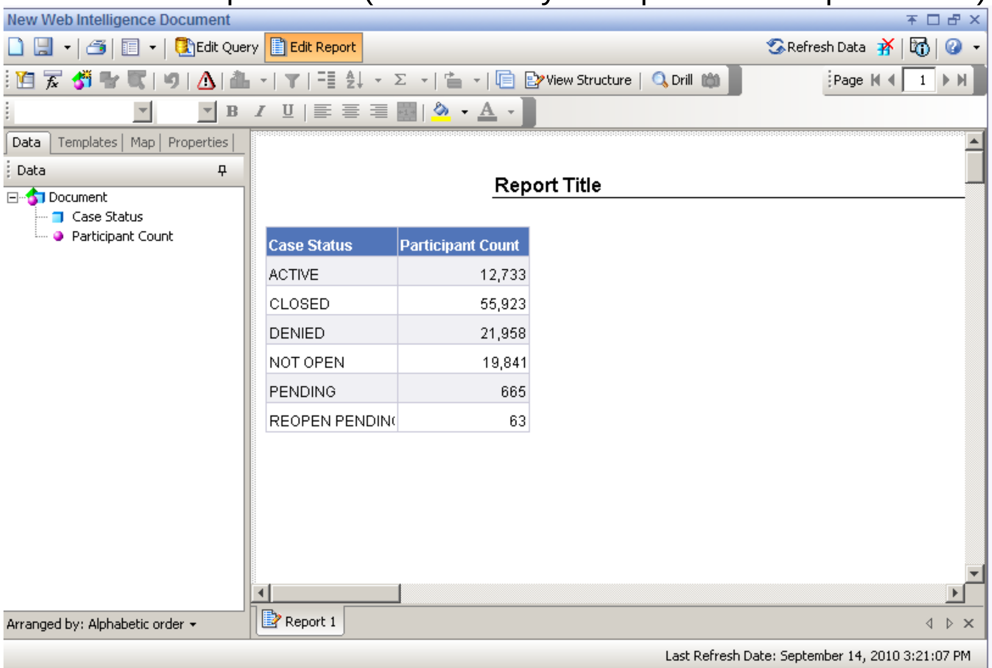


Note: If using between, you need to do the above steps to both text boxes on the query filter if you want both to be prompts.

Edit Report View

This view allows you to change the format of your report, add counts and totals, rearrange the layout of your report, and add variables and formulas to your report.

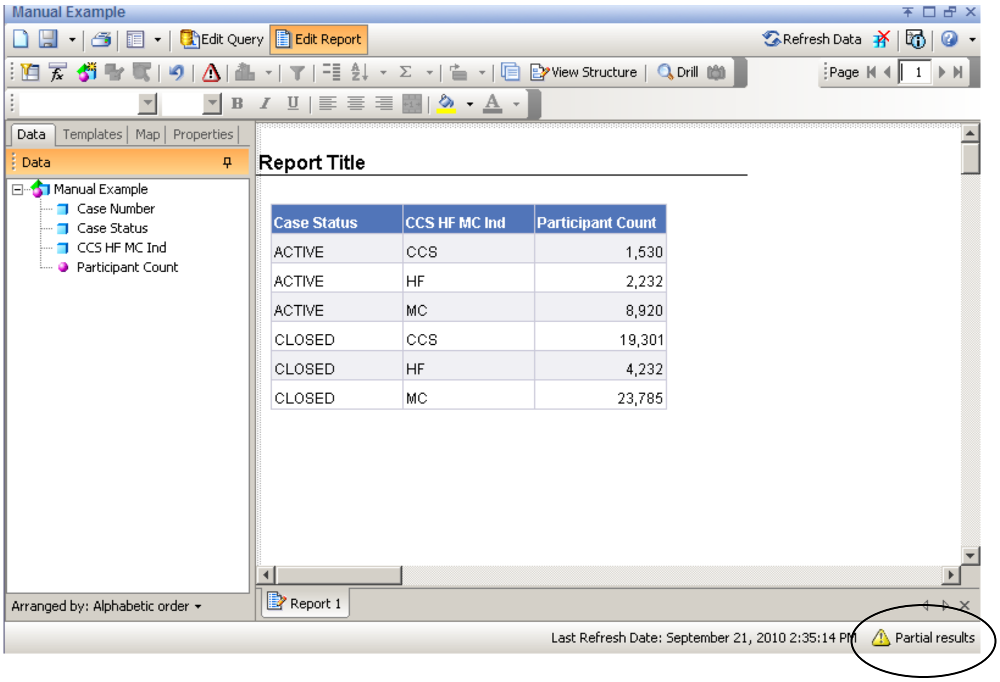
Edit Report has two main sections: Data (choose objects/fields to add to your report) and the main report view (shows how your report will look printed out).



Row Limit

Business Objects has a 60,000 line row limit. This means that you may hit the row limit if you are asking Business Objects to run a very large report, even if you don't want to display all the results on the report.

Reports with row limits will display the "Partial Results" warning as shown below.



To get around this, narrow down your query further or split your query into multiple queries that will not hit the row limit.

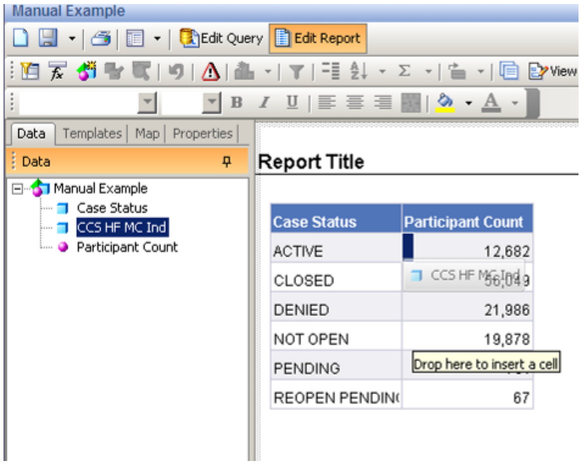
Add Fields To Your Report

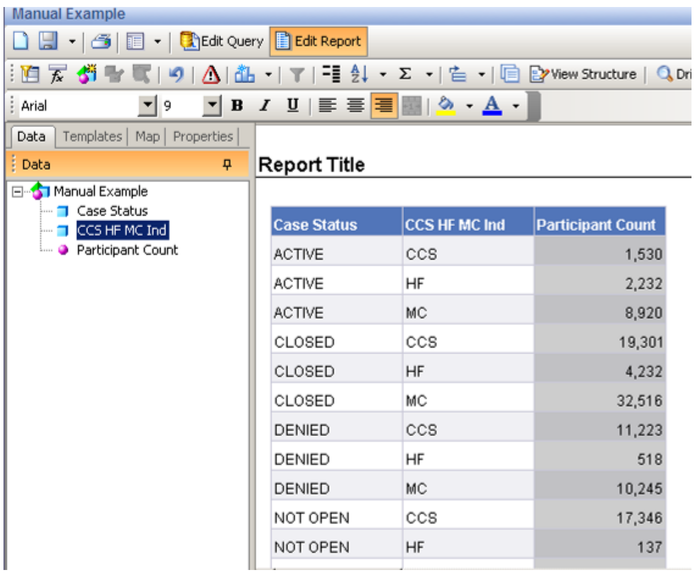
Each time you create a new Business Objects report, the system will add the fields you chose to the report view the first time you run your query. If you edit your query, run fields again, and then re-run your query the new fields will not appear on the report view.

To add the fields to the report view:

Click and hold the field/object you want to add to your report with your left mouse button. Drag the field onto the table in the report view. This part is a bit tricky- you want to add it to the end of one of the columns of the report. It is very easy to accidentally replace one of the current columns, place it outside the table, or place it somewhere you don't want it to be. **Make sure to use the undo button if this happens.**

Drag it until it looks like the screenshot below. The help text will say "Drop here to insert a cell." Release your left mouse button and a new column will appear with your data.

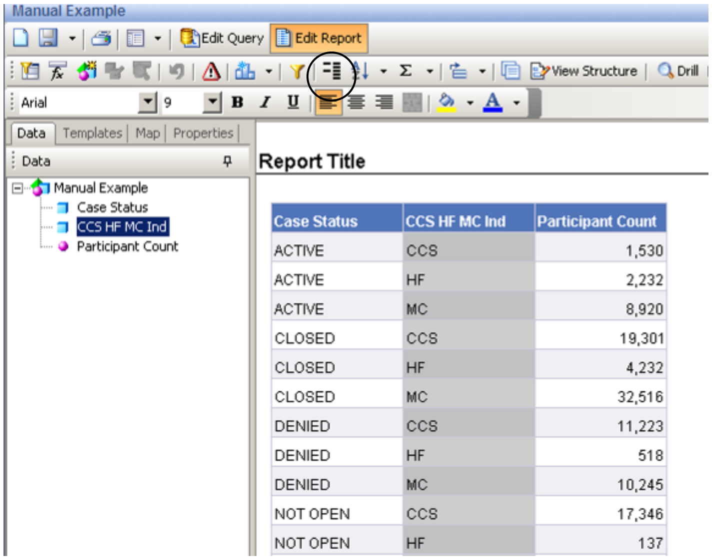


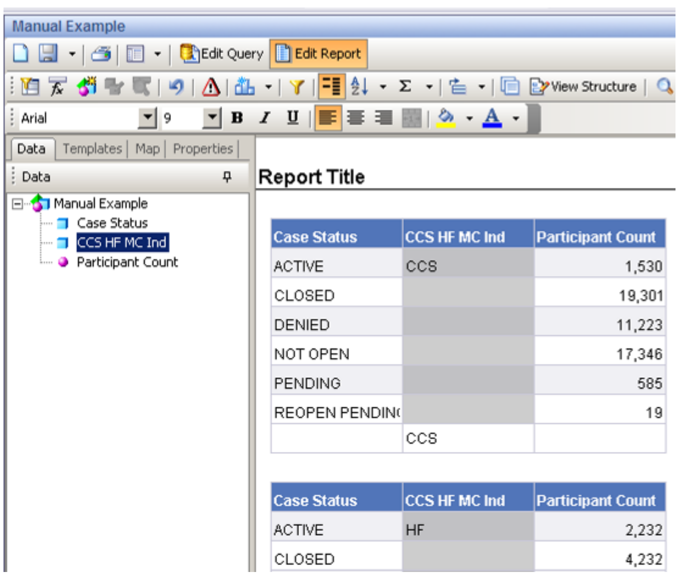


Breaks

Breaks group data into separate tables with no header. This is very helpful in organizing the data and making it more readable. You can have more than one break in your report.

Click the column of your report you want to make into a break. Click the break icon on the toolbar.



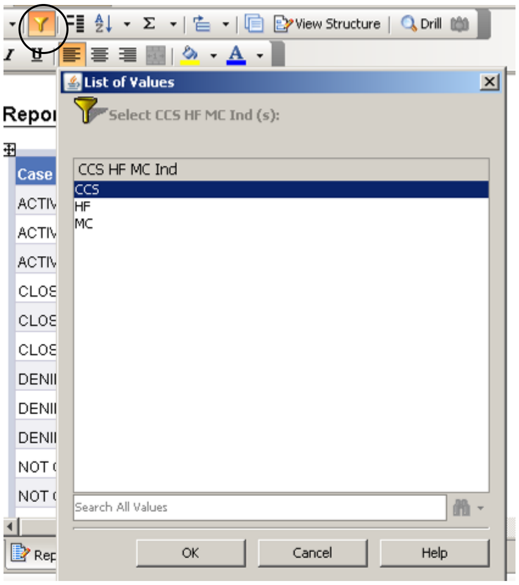


Filters

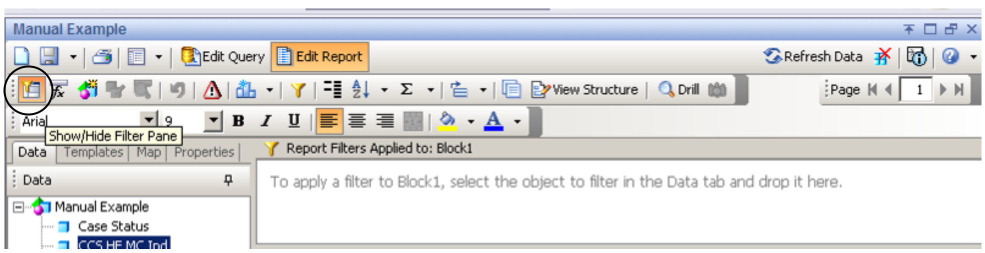
Filters are useful if you want to narrow down your search results without editing your query.

Click on the column you want to filter.

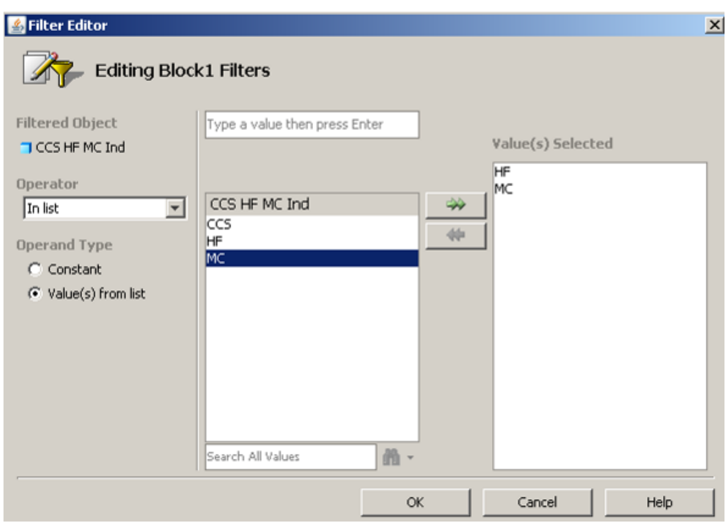
Click on the “Add Quick Filter” icon on the toolbar if you want to add a simple filter. Click on the item(s) you want to display on your report, then click the “OK” button. Use your shift or control keys on your keyboard while clicking to select more than one value.

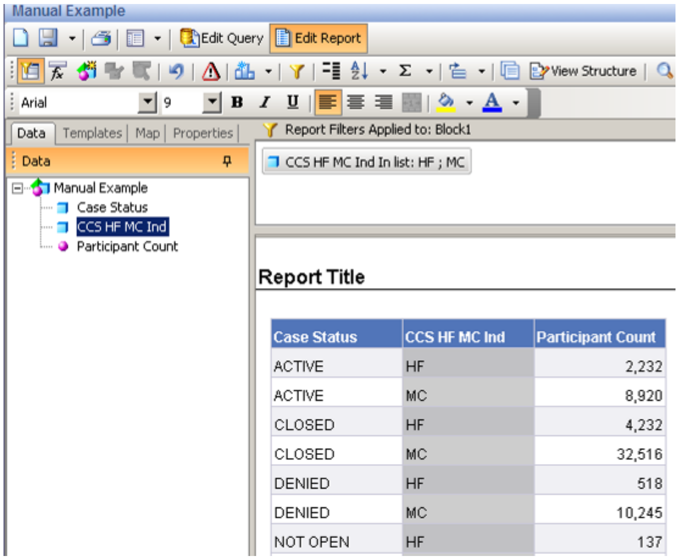


To add a more complex filter, click the “Show/Hide Filter Pane” icon on the toolbar.



Click, hold, and drag the object you want to filter from the “Data” section onto the filter area. You will now be able to do a more advanced filter on the report.

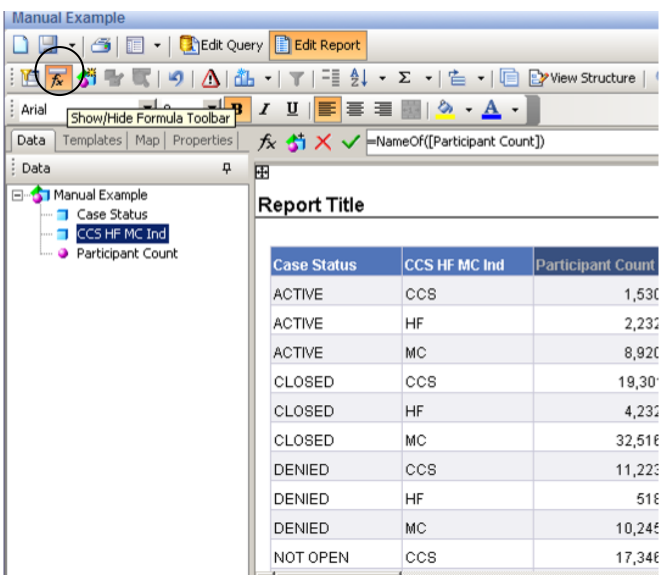




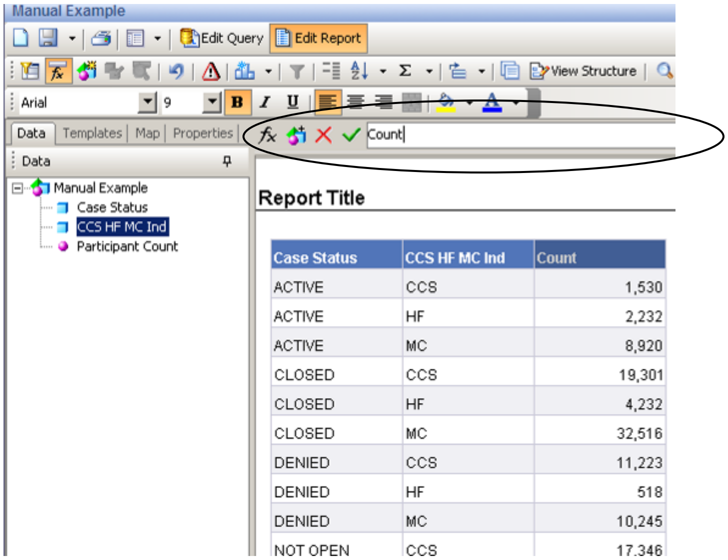
Formula Toolbar

If you are familiar with formulas, you can use the formula toolbar to create formulas in Business Objects. The syntax is similar to formulas in Microsoft Excel.

Click the "Show/Hide Formula Toolbar" icon on the toolbar if you do not see the formula toolbar.



Type in your formula and either hit the Enter key on your keyboard or the green check mark to the left of the formula text box to validate your formula.



Case Status	CCS HF MC Ind	Count
ACTIVE	CCS	1,530
ACTIVE	HF	2,232
ACTIVE	MC	8,920
CLOSED	CCS	19,301
CLOSED	HF	4,232
CLOSED	MC	32,516
DENIED	CCS	11,223
DENIED	HF	518
DENIED	MC	10,245
NOT OPEN	CCS	17,346

Moving Objects in the Report View

You can rearrange the tables and headers of your report.

Hover your mouse over the table or header until your mouse icon turns into ✥

Report Title

Case Status	Participant Count
ACTIVE	12,733
CLOSED	55,923
DENIED	21,958
NOT OPEN	19,841
PENDING	665
REOPEN PENDIN(	63

Click, hold, and drag the objects with your left mouse button. Let go of the mouse button when the object is where you want it.

Report Title

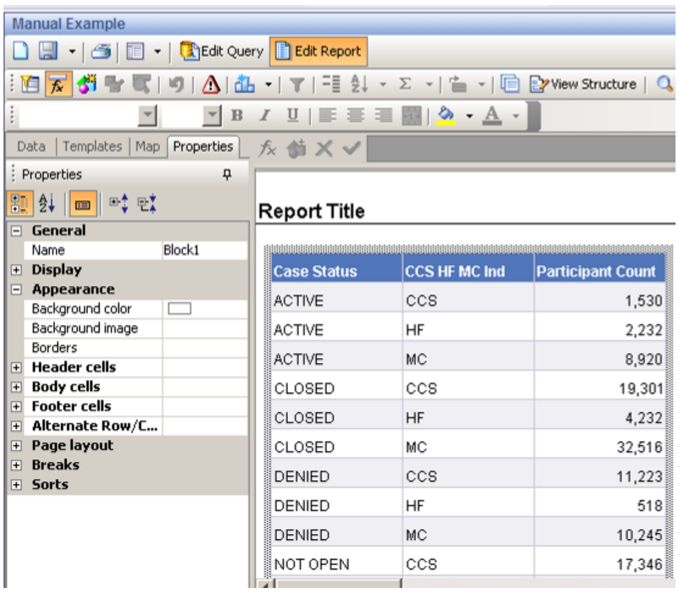
Case Status	Participant Count
ACTIVE	12,733
CLOSED	55,923
DENIED	21,958
NOT OPEN	19,841
PENDING	665
REOPEN PENDIN(	63

Properties

You can modify properties of the report, section, table, and the titles and columns within the table.

Click on the report, section, table, or title/column you want to modify.

Click on the “Properties” tab

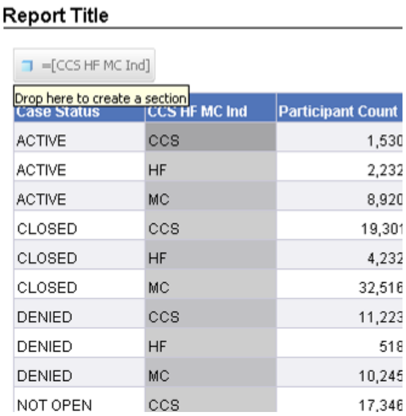


You can now modify position on the report, margins, orientation, font styles, cell color, whether headers and footers appear on each page, page breaks, etc. depending on what properties you are modifying.

Sections

Sections group data into separate tables with a header. This is very helpful in organizing the data and making it more readable. You can have more than one section in your report.

Click and hold the column of your report you want to make into a section. Drag the column you clicked on above the table, and drop it when you see the help text “Drop here to create a section.”

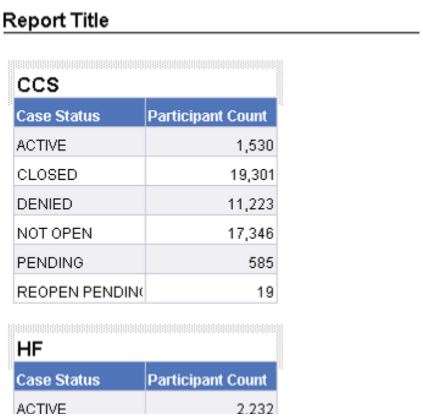


Report Title

=[CCS HF MC Ind]

Drop here to create a section

Case Status	CCS HF MC Ind	Participant Count
ACTIVE	CCS	1,530
ACTIVE	HF	2,232
ACTIVE	MC	8,920
CLOSED	CCS	19,301
CLOSED	HF	4,232
CLOSED	MC	32,516
DENIED	CCS	11,223
DENIED	HF	518
DENIED	MC	10,245
NOT OPEN	CCS	17,346



Report Title

CCS

Case Status	Participant Count
ACTIVE	1,530
CLOSED	19,301
DENIED	11,223
NOT OPEN	17,346
PENDING	585
REOPEN PENDIN(	19

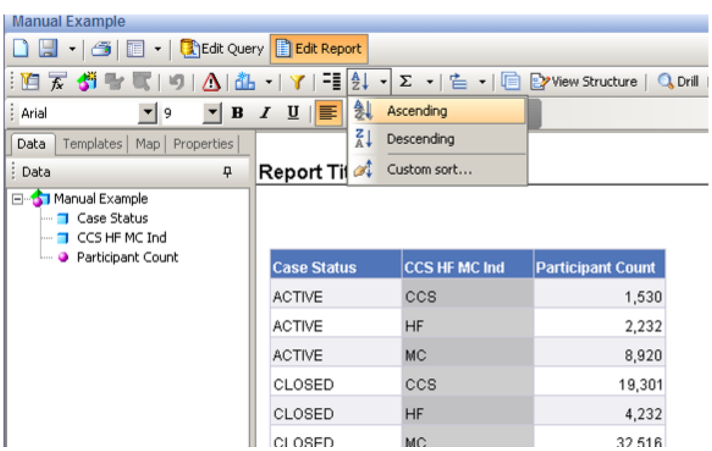
HF

Case Status	Participant Count
ACTIVE	2,232

Sort

Click on the column you want to sort. It will look like it is highlighted. Click the down arrow to the right of the sort icon and choose how you want to sort the data- Ascending or Descending.

You can sort more than one column- the first column you sort will be the first column sorted, the second column you sort will be sorted after the first one is in place, etc.



Case Status	CCS HF MC Ind	Participant Count
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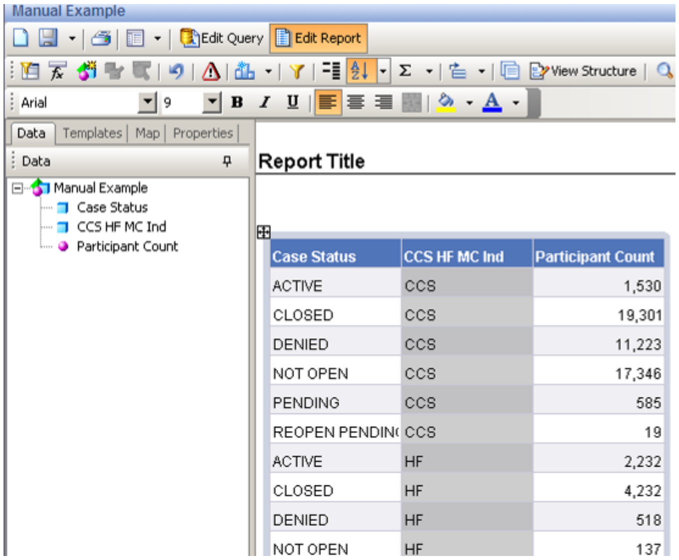
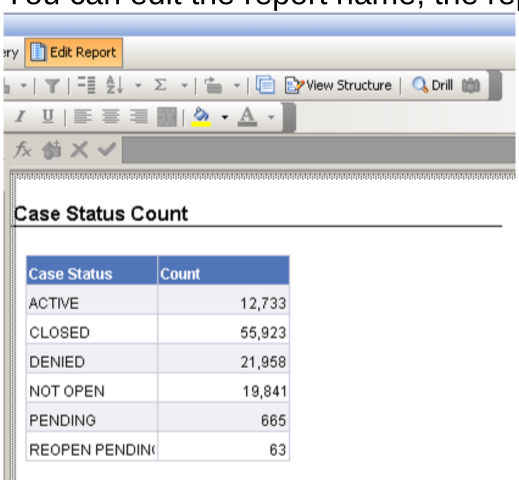


Titles

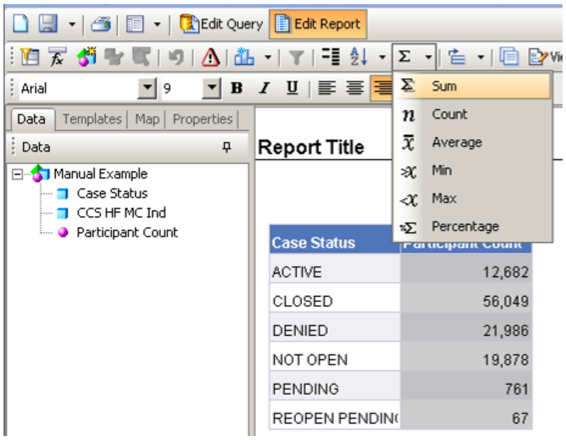
Double click on the name you want to edit. The formula bar will appear with the old name highlighted. Type in the new name, then press the enter key on your keyboard.

You can edit the report name, the report titles, and the fields in the report.



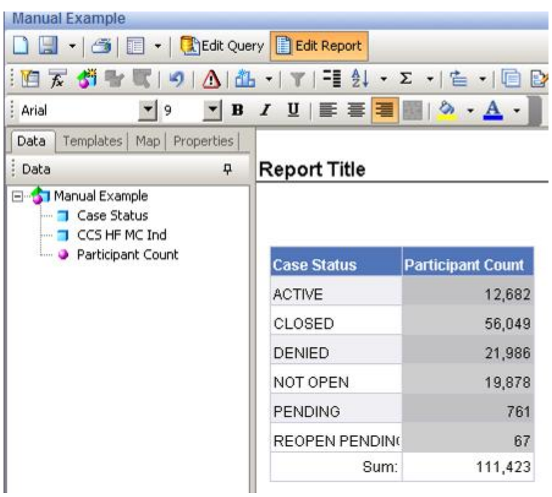
Totals, Counts, Averages

Click on the column you want to total. It will look like it is highlighted. Click the down arrow to the right of the sigma (E) and choose how you want to summarize the data.



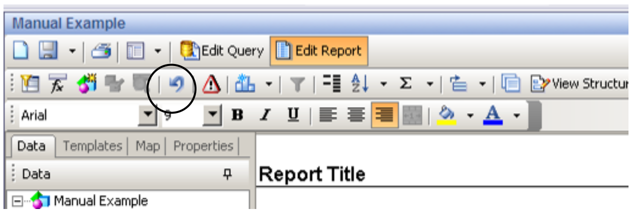
Sum	Adds all the numbers
Count	Counts the number of cells that contain unique values
Average	Returns the average (arithmetic mean).
Min	Returns the smallest number in a set of values.
Max	Returns the largest number in a set of values.
Percentage	Returns the percentage of a set of values.

The report below uses “Sum” to count all the numbers in the participant count row.



Undo

There is an undo button in Business Objects, but it only will undo one action (the last action you took). Make sure to use the undo button as soon as something happens you don't expect.

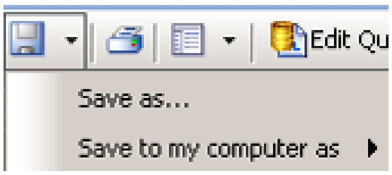


Saving the Report in Business Objects

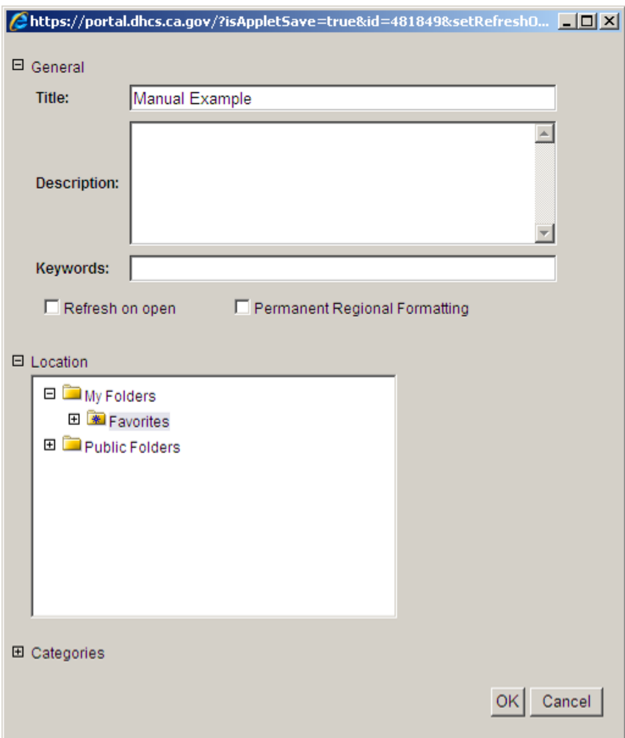
Make sure to save the report you created if you want to modify, run it at a later date, or send the report to another user.

Open the report in “Modify” mode

Click the down arrow next to the “Save” icon on the toolbar



Click “Save as…”



Type in the title of the report and any descriptions or keywords you want to add. Click “Refresh on open” if you want the report to run each time you open it. Click “OK” to save the report under your “Favorites” folder.

Saving the Report as Excel, Adobe PDF, or .CSV format

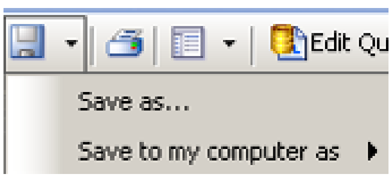
Saving a report will open the report in a new window. Some users will not see the new window- this is because of Internet Explorer settings, not Business Objects. If you do not see a new window, please contact your local IT and get their assistance in changing your browser permissions.

If you click on Excel, PDF, or CSV and the report disappears from the screen and you are taken to the beginning Business Objects welcome screen, simply navigate to the report and try again. This occasionally occurs when you try to save the report, but should not happen twice in a row.

Modify - Excel or Adobe PDF

Open the report in “Modify” mode

Click the down arrow next to the “Save” icon on the toolbar

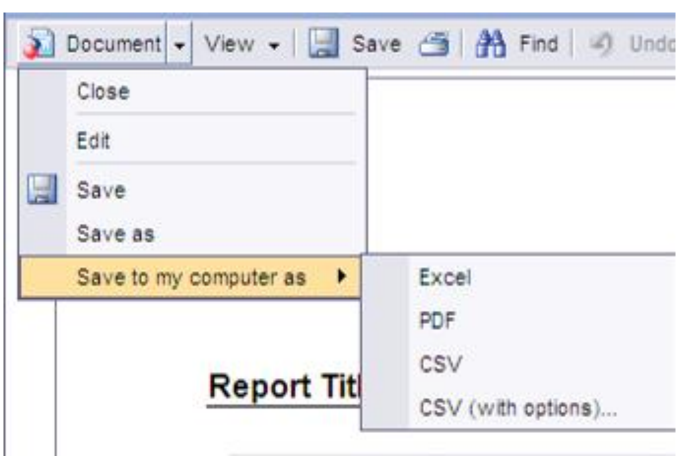


Highlight “Save to my computer as…” and click either Excel or PDF

View - Excel, Adobe PDF, or CSV (Comma Separated Values)

Open the report in “View” mode

Click the down arrow next to the “Document” icon on the toolbar



Highlight “Save to my computer as…” and click either Excel, PDF, or CSV

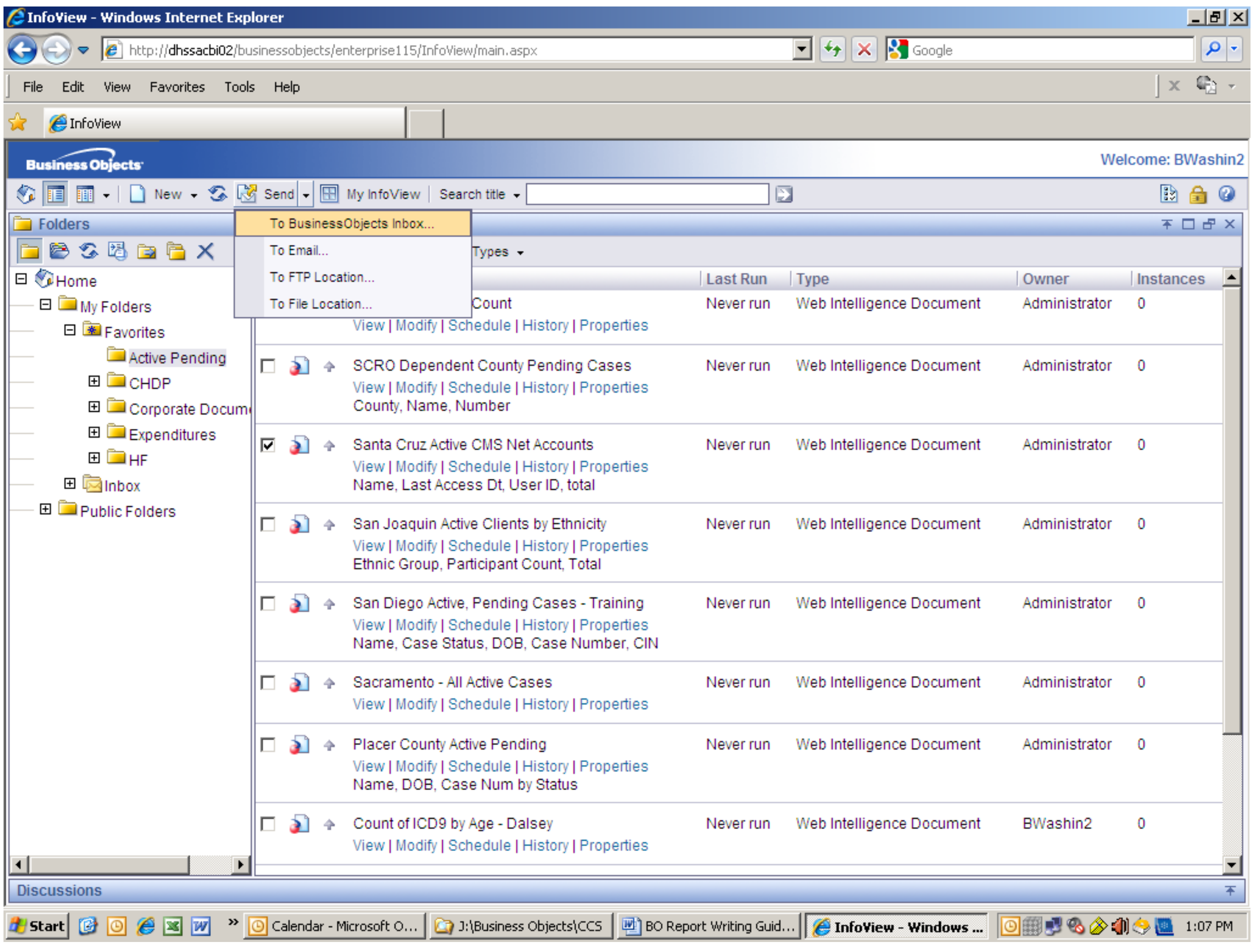
Sending Reports

You can generally only send reports to other report writers. If you send the document to another user that does not have rights to edit reports, the recipient will either not get the report or will only be able to view the information you pulled and refresh the report to get the latest results.

County users can send reports to other county users. State users can send reports to other State users. County and State users cannot send reports to each other.

Go into your favorites and check the box next to the report(s) you want to send.

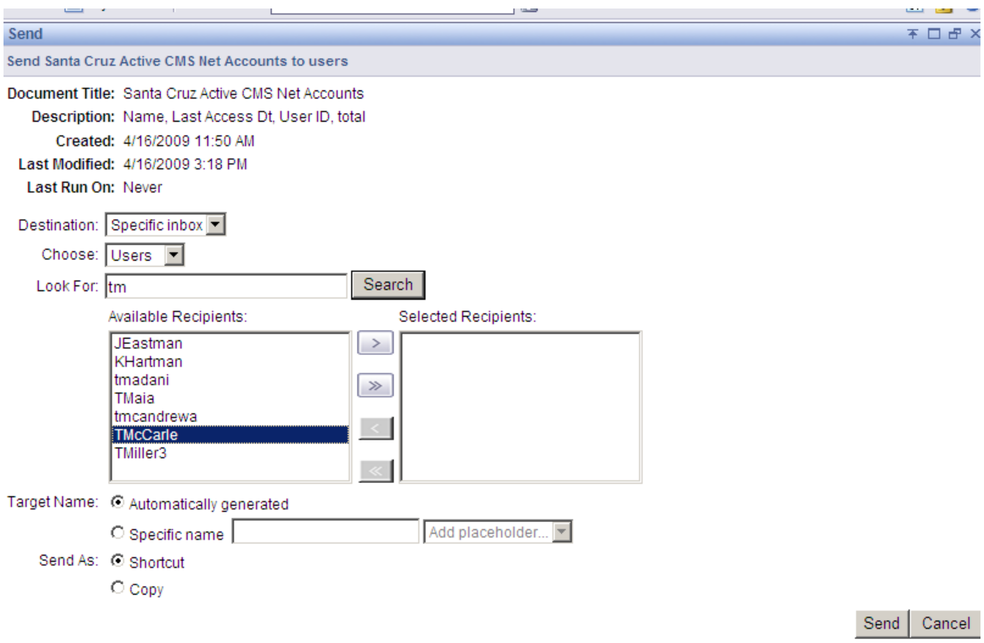
Click the “Send” drop down, and choose “To BusinessObjects Inbox…”



Click the “Destination” drop down and choose “Specific Inbox”

Type the user ID of the person you want to send the report to and click “Search”. The user ID is the first initial and part of the user’s last name. Please check with the person you want to send the report to if you are not sure which ID is theirs.

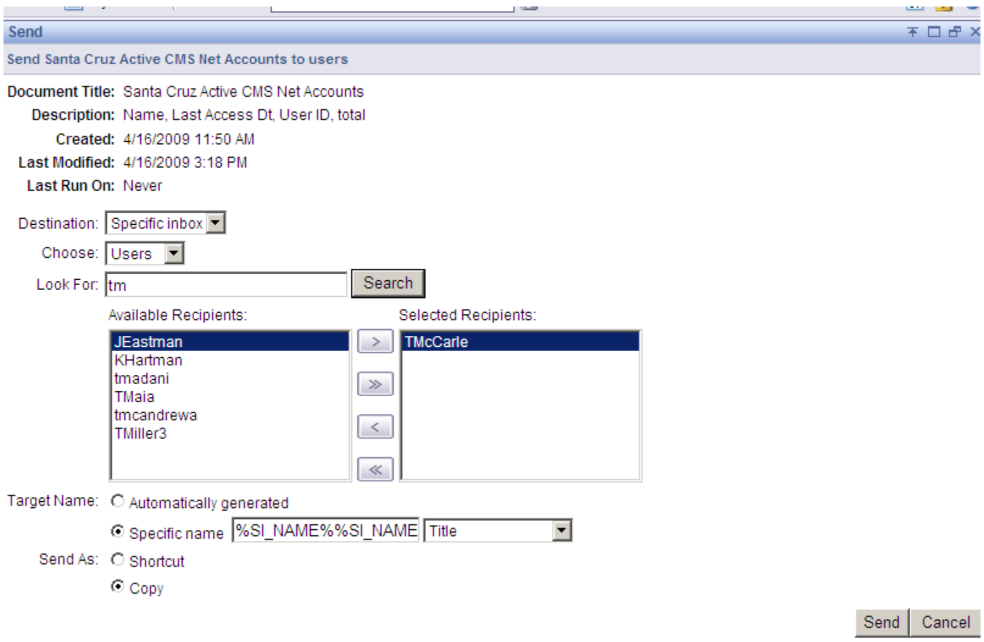
You can send your report to more than one person.



Click the correct user ID from the list of Available Recipients", and then click the ">" button to move the ID to "Selected Recipients".

Click the radio button next to "Specific Name". Click the "Add placeholder…" drop down and click "Title". (This will send the report with the actual title you gave it. If you do not do this, Business Objects will add numbers to the end of the title)

Click the radio button next to "Copy".



Click the “Send” button on the lower right hand portion of the screen to send the report to the user.

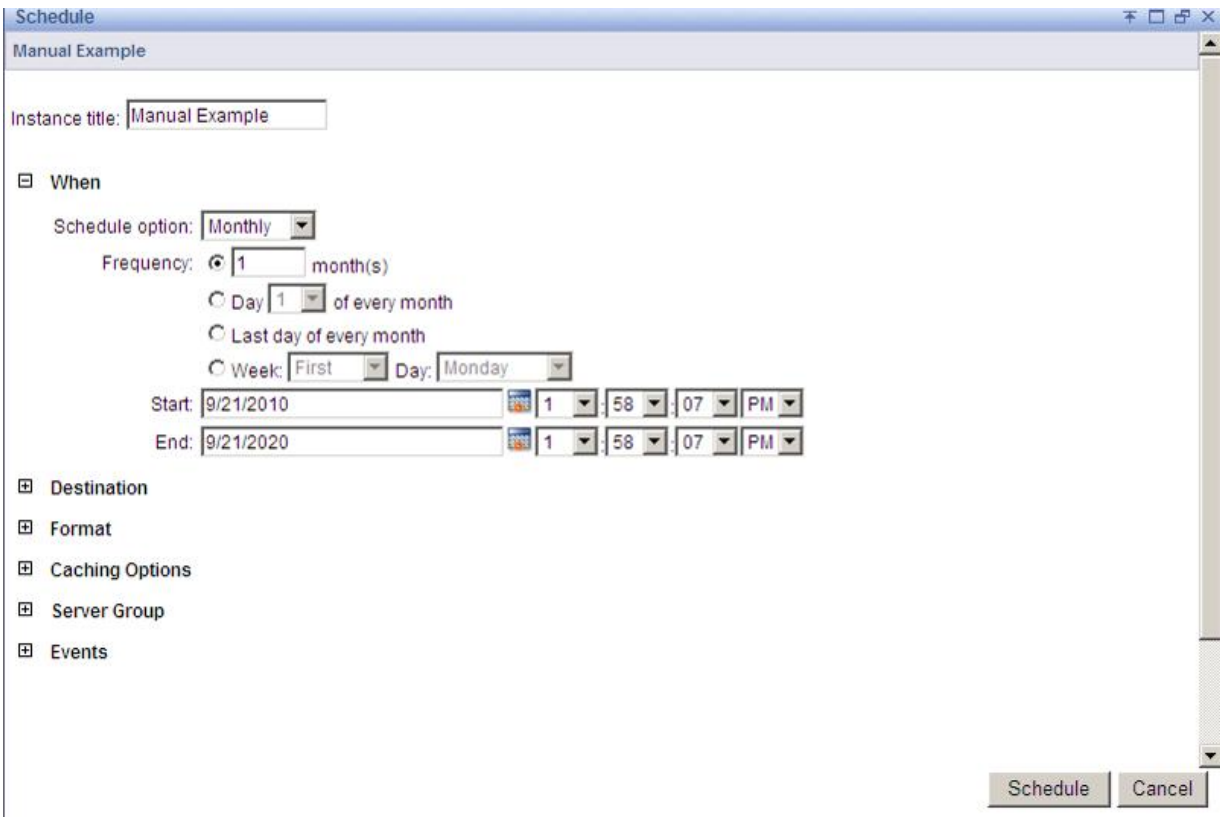
Scheduling

You can schedule a report to run automatically. It will keep a history of your past report runs. Make sure to create your report so the scheduling will work properly- using prompts, for example, would not work with scheduled reports.

Search for your report and click “Scheduling”

Edit the “When” section and change it to occur on the schedule you prefer.

You can play with the other sections if you like, but please be careful when selecting to send the scheduled report to an email inbox. It will not send securely and may violate HIPAA if your report contains patient information.



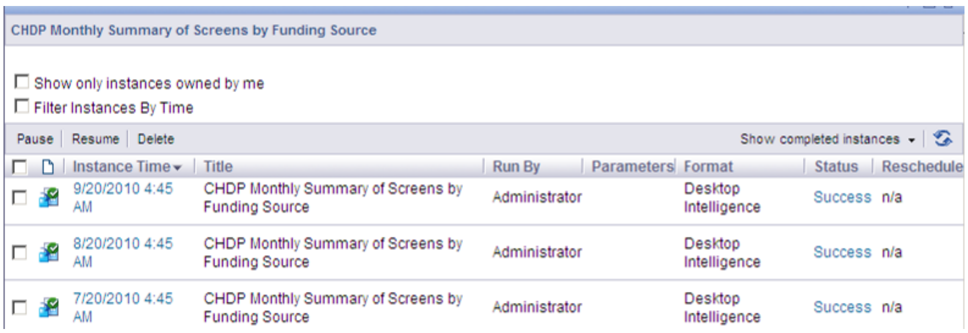
Click the “Schedule” button and your report will now run on the schedule you set.

History

History is how you view reports you have scheduled.

Search for your report and click "History"

Click on the report you want to view. They are listed by date.



Properties

You can modify the title, description, keywords, or location of your report by using Properties.

Search for your report and click "Properties"